INTRODUCTION

WHY SKETCH

"Sure, Stephanie, your idea that good visuals are important is a nice one, but who has that kind of time?" One of the things people always say to me is how long it takes to report. Folks are afraid that designing work well will increase how much time it will take them to produce their report deliverables, and often this imagined extra time is so intimidating that they abandon the notion of well-designed reporting altogether. This sketchbook is here to help you cut down on that prep time.

You do not have to be an artist to sketch. Listen, my drawings look like chicken scratch. At best, I use stick figures and what would appear to onlookers to be blobs. Detailed art is not the point of sketching. The point is simply to make a plan on paper with placeholders for content you'll refine when you are in front of a computer. Only you need to be able to decipher your drawings. You can always find a stock photo, take your own picture, or get a graphic designer to illustrate your ideas later on.

That said, you do not have to sketch alone. Team sketching is a vibrant method for exploring alternatives and coming to consensus. Sketching as a group is one way to elevate the input of those who speak up less often in meetings and provide more overall balance to opinions.

We used to sketch a lot more. Remember professors who drew out their ideas on the chalkboard or free-handed at the overhead projector? Computers replaced our need for live sketching, but that shift came at a cost that research is now uncovering.

In their massive literature review on sketching, Pfister and Eppler[1] culled multiple benefits, including increased memorability. They pointed to outcomes like "knowledge creation, sharing, and documentation" (p. 373), particularly

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[1]Pfister, R. A., & Eppler, M. J. (2012). The benefits of sketching for knowledge management. *Journal of Knowledge Management, 16*(2), 372–382.

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in team-building scenarios and meetings in organizational settings. Sounds good, huh? Schütze, Sachse, and Römer[2] studied the impacts of sketching and found that it helps shorter-term memory processing—it offloads some of the cognitive burden of visualizing content in our mind's eye and frees up our brain space for actual information processing. Their study participants who sketched generated higher-quality answers, too. *And* they said the study task was less difficult than those who did not sketch.

In other words, sketching is good for our brains. Mattison, Dando, and Ormerod[3] studied the impact of sketching on children. Their research showed that children with impaired free-recall memory (i.e., children with autism) were better able to actually recall things they had recently seen when they were allowed to sketch during cognitive interviews. Their responses were 20% more accurate and detailed than those of the control group (children without impaired free recall). Scheiter, Schleinschok, and Ainsworth[4] showed that the more people sketched, the better their learning outcomes on recall and transfer tests. Indeed, sketching has been shown (by Fernandes, Wammes, and Meade[5]) to produce better recall of content across ages, settings, and tasks. Their study reported that drawing no more than four seconds was enough to produce these benefits.

Sketching helps us test ideas. Use pencil! When we sketch, we work through the logical fallacies and errors that would otherwise be embedded in our visuals if we started out in front of a computer. We can iterate designs quickly on paper to minimize the overall time needed to solidify concepts.

Sketching is often a pathway to discovering insights not available at the surface of our thinking. The study produced by Tohidi, Buxton, Baecker, and Sellen[6]

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[2]Schütze, M., Sachse, P., & Römer, A. (2003). Support value of sketching in the design process. *Research in Engineering Design, 14,* 89–97.

[3]Mattison, M. L. A., Dando, C. J., & Ormerod, T. C. (2015). Sketching to remember: Episodic free recall task support for child witnesses and victims with autism spectrum disorder. *Journal of Autism Developmental Disorders, 45*, 1751–1765.

[4]Scheiter, K., Schleinschok, K., & Ainsworth, S. (2017). Why sketching may aid learning from science texts: Contrasting sketching with written explanations. *Topics in Cognitive Science, 9*, 866–882.

[5]Fernandes, M. A., Wammes, J. D., & Meade, M. E. (2018). The surprisingly powerful influence of drawing on memory. *Current Directions in Psychological Science, 27*(5), 302–308.

[6]Tohidi, M., Buxton, W., Baecker, R., & Sellen, A. (2006). User sketches: A quick, inexpensive, and effective way to elicit more reflective user feedback. In *Proceedings of the 4th Nordic Conference on Human–Computer Interaction: Changing Roles* (pp. 105–114). New York, NY: ACM.

reported that sketching facilitated reflection and revelation better than conventional methods (aka, just talking things out). You'll get better insights.

Additionally, planning out what your final deliverables will look like now will save you the cognitive energy you'd have had to expend later when crunching your numbers and thinking through your findings. You'll be making skeleton structures now that will be ready and waiting for your final numbers and narrative so that when your data analysis is finished, you can plug and play.

Why sketch? Sketching generates less error, more insights, and maybe even some joy.

WHAT'S AHEAD

This sketchbook is divided into sections, one per project. Within each section, you'll see:

- A Project Profile Page, where you'll list out your main deliverables, related audiences, fonts, colors, and all the other design parameters of your project so you can reference them in one handy place.

- Graph and Dot Grids. Oh yeah, its graph paper, where you can sketch the main graph styles you'll use. You should be able to identify these early in your project, because you already likely know most if not all the metrics you'll be reporting.

- Dashboard Designs on grid paper, where you can rough in a layout for reporting your key indicators, saving you hours of nudging and reorganizing in front of your computer screen.

- One-Page Handout Helpers on grid paper that can double as infographics

- A Slide Guide where you identify your main point (one per slide), quickly sketch the image to support your point, and list out your talking notes so that your on-screen slide construction time is a snap.

- A Report Structure, a place to draw your plans for your report cover and the basic structures for interior and section starter pages, as well as an executive summary.

Each section will provide different options for dashboard and infographic template layouts, so browse through each one along with the examples I've provided from my own projects to see which one most closely aligns with your project needs. If none of those are quite what you are looking for, each section also includes . . .

- Blank pages, where you can dream big.

Together, these sketches will help you develop a consistent, professional look and feel so that everything you produce from this project looks like it belongs together and was generated from someone who knows that high-quality content plus high-impact visual reporting leads to action and decision making.

If you get stuck just staring at a blank page, I'm here to help. First, I'll walk you through an entire project reporting package so you can find some inspiration. Second, on each template page I'll prompt your thinking with insights, tips, and resources. Third, my quantitative and qualitative chart choosers are printed on the inside front and back covers to serve as navigational tools and help you represent your data the clearest. Finally, this book has a hashtag, #evergreensketch—search this hashtag on your favorite social media site, find my sketches and others so you can see how this process looks in action, and get inspired.